



Energy Audit + Client Fit Filter

Use this tool to evaluate how your clients affect your energy, mindset, and business goals. This audit helps you identify which clients are a great match—and which may be draining you unnecessarily.

Page 1 – Introduction. Energy Audit + Client Fit Filter™

Every client costs more than time. They also require physical energy, mental focus, emotional resilience, and schedule flexibility. Clients who consistently drain these resources reduce the overall profitability and sustainability of your business.

Part 2: Energy Audit

After each client visit, take 60 seconds to rate your experience.

Rate each statement from **1 (Strongly Disagree)** to **5 (Strongly Agree)**.

STATEMENT	SCORE :1-5				
I felt calm and in control during this visit.	1	2	3	4	5
I felt respected and safe in this client's home.	1	2	3	4	5
I left the job feeling energized or neutral—not drained.	1	2	3	4	5
Communication with the client is usually smooth and clear.	1	2	3	4	5
I didn't feel rushed, micromanaged, or interrupted.	1	2	3	4	5

Your Total Score: _____

Part 2: Understanding Your Score

22-25

Excellent fit.

This client supports a healthy, sustainable business.

18-21

Generally a good fit.

Monitor for recurring issues.

13-17

Proceed with caution.

This client may be creating unnecessary stress or inefficiency.

5-12

Poor fit.

This relationship is likely costing more than it contributes.

Page 4 – Client Fit Filter.

Use these questions to evaluate if a client aligns with your business vision:

If you answer “no” to 2 or more, this may not be a good long-term fit.

☐ Does this client respect my pricing?	Y/N
☐ Do they respect my schedule?	Y/N
☐ Do they communicate professionally?	Y/N
☐ Are expectations realistic?	Y/N
☐ Would I happily recommend this client to another cleaner?	Y/N
☐ If I had one opening left, would I give it to this client?	Y/N

Page 5 – Decision Matrix

Energy	Business Fit	Recommendation
High	High	Keep and prioritize
High	Low	Set boundaries or improve expectations
Low	High	Identify the source of stress and address it
Low	Low	Consider ending the relationship

Page 6 – Action Plan

For the clients that with a low-fit score , ask yourself the following questions:

- What is one issue I can discuss with this client?
- What boundary needs to be introduced?
- Is this relationship still profitable?
- Would replacing this client improve my business?

Final Reflection:

Your business should be built around clients who respect your work, value your service, and support the life you're trying to create. Every space in your schedule is valuable. When it's occupied by the wrong client, it isn't available for the right one. The goal isn't to have as many clients as possible. The goal is to have only right for your business clients .